

PX17

PX17 Attachment AW

RevLive sales form



## GoLive! Form

We are very excited to have you on board! Please take a moment to complete the below New Client Form in order for us to set up your configuration. In this document you will find the following items:

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Over the next few weeks we will be taking the following steps:

1. Initial Launch Call
2. Account Set Up
3. CRM Migration
4. Launch

Your RevLive Team	
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Please take a moment to highlight your particular goal with our solution; please choose one:

- a. High emphasis on driving profitability by cutting my refund and customer service costs; chargebacks are looking good and can stay where they are
- b. Looking to drive profitability by cutting my refund and customer service costs AND lower my chargebacks slightly (10-15%)
- c. Need to slash chargebacks aggressively and within 30 days by 40% or more. I'm fine with no profitability gain or even a slight cost to complete this.

Please confirm order volume totals across your brand(s):

- d. Current orders/day:
- e. In 30 days, orders/day:



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Company Information			
Company Name:			
Company Address:			
Primary Contact:			
Desired Branding:			
Primary Phone:			
Primary Email:			
RG Brand ID:			
Technical Contact:			
API Login URL:			
API Username		API Password:	
Refund Policy Choice:			
*****EXPECTED LAUNCH DATE*****			
Launch Date	[Our call centers need at least 5-7 business days for training upon receipt of all materials]		
Customer Service Set-Up			
Call Center		Call Center Hrs	
CS Number (s)			
Transfer to CS Number (s)			
CRM URL			
CRM User		CRM Password	
Test Credit Card #		Card Expiration:	
Customer Email Management			
If we will be providing support to your customer service email, please provide logins for each brand below.			
Brand #1:			
Web Login URL			
Email Address			
Brand #2:			
Web Login URL			
Email Address		Email Password	
Brand #3:			
Web Login URL			
Email Address		Email Password	
If you do not have a URL please provide us with the following:			
Account Type	[POP3 or IMAP]	SSL?	[Y/N]
Incoming Mail Server			
Outgoing Mail			



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Server			
<b>BBB-AG Complaint Handling</b>			
If we will be handling your BBB and AG Complaints please provide the following information:			
BBB Complaint Email Address			
<b>Fulfillment</b>			
Current Fulfillment Center			
Primary Contact			
<b>Brand Information</b>			
Please provide each of your brand's information below and add sections for additional brands.			
Brand #1 Name:			
Landing Page:			
Phone Number:			
End of Trial Price:			
Ongoing Price:			
Trial Length:			
In Trial IDs:			
Post Trial Product IDs:			
Ongoing Product IDs			
Campaign IDs:			
Shipping ID:			
Straight Sale IDs:			
Save Sale Prices:			
Save Sale IDs:			
Instant Refunds with RMAs?	[Y/N]	Multiple Handle Allowed?	[Y/N]
Partial Refund Offers			
Return Deadline			
Return Address			
Special Instructions:			
Offer Deadline Instructions:			
Please provide each of your brand's information below and add sections for additional brands.			
Brand #2 Name:			
Landing Page:			

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Phone Number:			
End of Trial Price:			
Ongoing Price:			
Trial Length:			
In Trial IDs:			
Post Trial Product IDs:			
Ongoing Product IDs			
Campaign IDs:			
Shipping ID:			
Straight Sale IDs:			
Save Sale Prices:			
Save Sale IDs:			
Instant Refunds with RMAs?	[Y/N]	Multiple Handle Allowed?	[Y/N]
Partial Refund Offers			
Return Deadline			
Return Address			
Special Instructions:			
Offer Deadline Instructions:			
Please provide each of your brand's information below and add sections for additional brands.			
Brand #3 Name:			
Landing Page:			
Phone Number:			
End of Trial Price:			
Ongoing Price:			
Trial Length:			
In Trial IDs:			
Post Trial Product IDs:			
Ongoing Product IDs			
Campaign IDs:			
Shipping ID:			
Straight Sale IDs:			
Save Sale Prices:			
Save Sale IDs:			
Instant Refunds	[Y/N]	Multiple Handle	[Y/N]



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with RMAs?		Allowed?	
Partial Refund Offers			
Return Deadline			
Return Address			
Special Instructions:			
Offer Deadline Instructions:			

### Refund Policies

Please take a moment to review all of our refund policies, and choose which chargeback sensitivity you want us to implement.

#### Chargeback Sensitivity: Low

1. If a customer calls in the same day they ordered and wants to stop shipment, if the order does not show sent to fulfillment, then refund shipping charge on all orders. This automatically stops recurring.
2. Stop recurring on the related Fitness order.
3. If the orders shows it was already sent to Fulfillment, then please tell the customer:
  - a. "I apologize but we cannot stop the shipment, but I have canceled your account. I will give you an RMA number and if you would please write that number on the package and do a Return To Sender." Issue the RMA like usual and provide that to the customer.
4. Note the acct with "cust canx prior to shipping and so refund given and subs canx".

#### Instant Full Refund for Threats: NO.

- A. If a customer is making valid threats (AG, Bank, BBB, FTC, Lawyer/Lawsuit, Police/Authorities) you can offer a full refund upon return faster, BUT save sales MUST still be offered.
  - a. DO NOT PUT "customer did not make valid threats" in notes, put "Cust did not request refund" instead.
- B. IF threats were made, please list the type of threat in the notes.
- C. If all Partial refunds are declined and threats are still being made, offer the ongoing return.
- D. If a customer accepts a save sale and does not make any new threats, do not make further offers.

#### Instant Full Refund If Bank Rep is on the Line: YES

#### 60/40 Return: No

Refund if over 30 days: OK to set up a return with threat up to 45 days, must get approval from a supe for anything over 45 days. No refunds for anything over 6 months old.

Refund multiple packages: Only with supe approval if the customer is extremely escalated

#### Return Deadline: 30

Ok to assist with multiple products on the same call: YES



## GoLive! Form

### Chargeback Sensitivity: Low to Medium

1. If a customer calls in the same day they ordered and requests that we stop the shipment make ECSS and RMA offers, before offering to cancel the shipment.
2. If customer declines ECSS/RMA offers, then, if the order does not show in the system history notes that it has been sent to fulfillment already, then do a Void in Limelight. Go to the Void/Refund field and click on Void to do this.
3. If the customer declines ECSS/RMA offers, and the order shows in the system history notes that it has already been sent to fulfillment, then tell the customer this IF the customer will not accept an ECSS/RMA offer:
  - a. "I apologize but we cannot stop the shipment, but I have canceled your account. I will give you an RMA number and if you would please write that number on the package and do a Return To Sender." Issue the RMA like usual and provide that to the customer.

THREATS ARE NOT REQUIRED TO OFFER Partial refunds!!! Can offer Partial refunds for escalated, persistent customers without threats.

#### Instant Full Refund for Threats: NO

- A. If a customer is making valid threats (AG, Bank, BBB, FTC, Lawyer/Lawsuit, Police/Authorities) you can offer a full refund upon return faster (RMA), BUT save sales MUST still be offered.
  - a. DO NOT PUT "customer did not make valid threats" in notes, put "Cust did not request refund" instead.
  - b. IF threats were made, please list the type of threat in the notes.
- B. If all Partial refunds are declined and threats are still being made, offer the ongoing return.
- C. If a customer accepts a save sale and does not make any new threats, do not make further offers.

#### Instant Full Refund If Bank Rep is on the Line: YES

60/40 Return: NO

Refund if over 30 days: OK to set up a return with threat up to 45 days, must get approval from a supe for anything over 45 days.

Refund multiple packages: Only with supe approval if the customer is extremely escalated. Two months Maximum.

Return Deadline: 15 days

### Chargeback Sensitivity: Medium

1. If a customer calls in the same day they ordered and requests that we stop the shipment make ECSS and RMA offers, before offering to cancel the shipment.
2. If customer declines ECSS/RMA offers, then, if the order does not show in the system history notes that it has been sent to fulfillment already, then do a Void in Limelight. Go to the Void/Refund field and click on Void to do this.
3. If the customer declines ECSS/RMA offers, and the order shows in the system history notes that it has already been sent to fulfillment, then tell the customer this IF the customer will not accept an ECSS/RMA offer:
  - a. "I apologize but we cannot stop the shipment, but I have canceled your account. I will give you an RMA number and if you would please write that number on the package and do a Return To Sender." Issue the RMA like usual and provide that to the customer.



## GoLive! Form

Can offer Partial refunds for escalated, persistent customers without threats

Instant Full Refund for Threats: NO – you can fold to a full refund upon return faster, save sales MUST still be offered.

- A. If a customer is making valid threats (AG, Bank, BBB, FTC, Lawyer/Lawsuit, Police/Authorities) you can offer a full refund upon return faster, BUT save sales MUST still be offered.
  - a. DO NOT PUT "customer did not make valid threats" in notes, put "Cust did not request refund" instead.
  - b. IF threats were made, please list the type of threat in the notes.
- B. If all Partial refunds are declined and threats are still being made, offer the ongoing return.
- C. If a customer accepts a save sale and does not make any new threats, do not make further offers.

Instant Full Refund If Bank Rep is on the Line: YES

60/40 Return: No

Refund if over 30 days: OK to set up a return with threat up to 45 days, must get approval from a supe for anything over 45 days. No refunds for anything over 6 months old.

Refund multiple packages: Only with supe approval if the customer is extremely escalated

Return Deadline: 15 days

### Chargeback Sensitivity: Medium/High

1. If a customer calls in the same day they ordered and requests that we stop the shipment make ECSS and RMA offers, before offering to cancel the shipment.
2. If customer declines ECSS/RMA offers, then, if the order does not show in the system history notes that it has been sent to fulfillment already, then do a Void in Limelight. Go to the Void/Refund field and click on Void to do this.
3. If the customer declines ECSS/RMA offers, and the order shows in the system history notes that it has already been sent to fulfillment, then tell the customer this IF the customer will not accept an ECSS/RMA offer:
  - a. "I apologize but we cannot stop the shipment, but I have canceled your account. I will give you an RMA number and if you would please write that number on the package and do a Return To Sender." Issue the RMA like usual and provide that to the customer.

Can offer Partial refunds for escalated, persistent customers without threats

Instant Full Refund for Threats: Yes, follow A, B and C below

- A. If a customer is making valid threats (AG, Bank, BBB, FTC, Lawyer/Lawsuit, Police/Authorities) you can offer a full refund upon return faster, BUT save sales MUST still be offered.
- B. If all Partial refunds are declined and threats are still being made, offer the ongoing return.
- C. If a customer accepts a save sale and does not make any new threats, do not make further offers.
- D. If the customer is still threatening after an RMA full has been offered, issue an immediate refund.

Instant Full Refund If Bank Rep is on the Line: YES



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Refund if over 30 days: OK to set up a return with threat up to 45 days, must get approval from a supe for anything over 45 days. No refunds for anything over 6 months old.

Refund multiple packages: Only with supe approval if the customer is extremely escalated

Return Deadline: 30 days

### Chargeback Sensitivity: High

1. If a customer calls in the same day they ordered and requests that we stop the shipment make ECSS and RMA offers, before offering to cancel the shipment.
2. If customer declines ECSS/RMA offers, then, if the order does not show in the system history notes that it has been sent to fulfillment already, then do a Void in Limelight. Go to the Void/Refund field and click on Void to do this.
3. If the customer declines ECSS/RMA offers, and the order shows in the system history notes that it has already been sent to fulfillment, then tell the customer this IF the customer will not accept an ECSS/RMA offer:
  - a. "I apologize but we cannot stop the shipment, but I have canceled your account. I will give you an RMA number and if you would please write that number on the package and do a Return To Sender." Issue the RMA like usual and provide that to the customer.

Can offer Partial refunds for escalated, persistent customers without threats

Instant Full Refund for Threats: Yes, follow A, B and C below

- A. If a customer is making valid threats (AG, Bank, BBB, FTC, Lawyer/Lawsuit, Police/Authorities) you can offer a full refund upon return faster, BUT save sales MUST still be offered.
- B. If all Partial refunds are declined and threats are still being made, offer the ongoing return.
- C. If a customer accepts a save sale and does not make any new threats, do not make further offers.
- D. If the customer is still threatening after an RMA full has been offered, issue an immediate refund.

Instant Full Refund If Bank Rep is on the Line: YES

Refund if over 30 days: OK to set up a return with threat up to 45 days, must get approval from a supe for anything over 45 days. No refunds for anything over 6 months old.

Refund multiple packages: Only with supe approval if the customer is extremely escalated

Return Deadline: 30 days

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### **Special Instructions:**